



Thursday, September 8, 2016

The Probate Examiner's Office recommends approval of the following Probate matters:

11	16CEPR00398	Louie Souza (Spousal)
16	16CEPR00795	Elizabeth Bulmer (Estate)
17	16CEPR00797	Arthur T. Miyakawa (Estate)
24	16CEPR00766	Isiah Hervey (Det. Succ)

The following Probate matters have been continued at the request of the Petitioner or the Petitioner's attorney:

4	10CEPR00830	Shirley B. Taylor (Estate) cont. to 10/19/16
5	15CEPR00055	Allison Holt (GUARD/E) cont. to 10/18/16
6	15CEPR00056	Anna Holt (GUARD/E) cont. to 10/18/16
9	15CEPR00842	William George Bongardt (Estate) cont. to 10/24/16

The following Probate matters have been taken off calendar:

**Appearance of counsel is recommended for all remaining Probate matters set for hearing.
Thank you.**

Dept. 303, 9:00 a.m. Thursday, September 8, 2016

1 Frances B. Van Camp (Estate)**Case No. 05CEPR00250****Attorney: Heather H. Kruthers (for Public Administrator/Successor Administrator)****Objector: Preston Van Camp (former Administrator)****First and Final Account and Report of Successor Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution.**

DOD: 11/25/2004		PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Amendment to First and Final Account was filed on 8/31/16. Pursuant to California Rules of Court, Rule 7.53(a) an amendment to a pleading requires the same notice of hearing as the pleading it amends. Therefore, need proof service of the Notice of Hearing, 15 days prior to the hearing on: a. Preston Van Camp b. Pamela Van Camp 2. Amendment to First and Final Account alleges that at the hearing on 7/21/16 Pamela Van Camp provided a writing that Preston Van Camp had executed returning her interest in property that she had previously assigned to Preston. That document has not been filed, but Preston Van Camp admitted in Court that what Pamela had was a signed writing by him assigning Pamela's interest back to her. Court may require the document assigning the property back to Pamela to be filed prior to distribution.
		Account period: 1/5/07 – 5/25/16	
Cont. from 072116		Accounting - \$176,659.00	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$175,249.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$ 48,067.23	
<input checked="" type="checkbox"/>	Inventory	Administrator (statutory) - \$3,306.36	
<input checked="" type="checkbox"/>	PTC	Administrator x/o - \$1,248.00 (for sale of real property and preparation of taxes)	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney (statutory) - \$3,306.36	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney x/o - \$1,890.00 (itemization, 12.5 hours @ \$150/hour for unlawful detainer with appeal)	
<input checked="" type="checkbox"/>	Aff.Mail	Court Costs - \$46.50 (certified copies)	
	W/	Closing - \$2,000.00	
	Aff.Pub.	Distribution, pursuant to intestate succession and assignments of interest is to:	
	Sp.Ntc.	Preston Van Camp - \$23,301.14	
	Pers.Serv.	Pamela Van Camp - \$11,650.57	
	Conf. Screen	Please see additional page	
<input checked="" type="checkbox"/>	Letters		
	4/14/05		
	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 8/31/16
Updates: 9/1/16
Recommendation:
File 1- Van Camp

Objection to Final Account filed by Preston Van Camp on 7/7/16. Objector states he was removed as Administrator of the Estate by this Court on 11/28/06 for failure to file an accounting and distribution.

Mr. Van Camp alleges he never mismanaged the estate and no evidence was ever introduced to this court supporting a claim of mismanagement nor was there every any action on the part of Van Camp that led to a loss of estate assets.

The final Accounting submitted by Kruthers did not approve Van Cam his filing fee of \$281.00 nor his 280.00 for notice of publication. Van Camp objects to not receiving reimbursement for these fees.

Van Camp spent hundreds of working hours on the estate, researched over 10 years of personal income taxes for the decedent and her deceased husband. Van Camp filed proper notices with the County of Fresno so that the property tax would be adjusted according to law. Personal payments on the estate's real property, association fees, and property taxes were made during the entire time Van Camp was administrator. Van Camp published notices of the estate, filed the petition plus status reports to the court and submitted three accountings of the estate. Van Camp noticed all creditors including Medi Cal and the State of California. Van Cam had the real property appraised and filed the inventory and appraisal. Most of the estate had already been completed by Van Camp, except for the selling of the real property and paying the debts.

Kruthers and the Fresno County Public Administrator took over management of the estate in November 2006. During the vast majority of the ten years since the County took over, they did nothing and let the estate fall into waste, disrepair, and substantial loss of market value. There is evidence of mismanagement in this estate by Fresno County. Van Camp asks the court to take judicial notice of the public administrator assigned to this estate throughout the last ten years and their subsequent criminal charges related to their job duties as public administrators.

For these reasons, Van Camp objects to Kruthers failure to distribute to Van Camp any administrator fees. Van Camp objects to Kruthers' request for extraordinary fees in its entirety based upon the negligence of the County of Fresno Public Administrator and also request that Kruthers is not entitled to any attorney fees, or public administrator fees, or at most a very minimal amount.

Kruthers had notice that there was an ongoing claim by Pamela Van Camp who was paying the mortgage and homeowner association dues throughout all the years this case was in probate. The approval of a claim by the Public Administrator and Kruthers for costs paid to the mortgage company are dubious at best since the liquid assets in the estate was limited to \$9.00. Van Camp requests receipts showing proof the Public Administrator made those payments.

Finally, Van Camp objects to Kruthers' Final Accounting which never addressed nor paid the Claim of Lien that Fan Camp filed with the Fresno County Recorder's Office in the amount of \$37,061.12 and recorded on the real property in the estate.

Attorney Susan K. Arthur, of Walton & Mitchell, Sanger (for Garren J. McMurry, Administrator)
 Attorney James R. Walton (retired; formerly for Garren J. McMurry, Administrator)

Notice of Motion and Motion to be Relieved as Counsel

DOD: 11/13/2006		<p>SUSAN K. ARTHUR, of WALTON & MITCHELL, Attorney of record for Personal Representative GARREN J. MCMURRY, is Movant.</p> <p>GARREN J. MCMURRY, son, was appointed Administrator with Full IAEA without bond on 5/22/2007, and Letters issued on that date.</p> <p>Movant requests under Code of Civil Procedure § 284(2) and CA Rule of Court 3.1362 an order permitting her to be relieved as attorney of record in this proceeding.</p> <p>Motion is supported by Declaration of Susan K. Arthur, papers and records filed in this proceeding, and the following additional documents and evidence:</p> <ul style="list-style-type: none"> Letter to Garren J. McMurry dated May 15, 2015; Letter to Roberta Skogsberg, daughter, dated May 29, 2015; Copy of Tax Deed to Purchaser of Tax—Defaulted Property last assessed to James A. McMurry recorded on April 5, 2013; Photocopy of the envelope of returned certified letter our office sent to Garren McMurry; the letter was returned to our office on June 11, 2015; Letter to Garren J. McMurry dated May 16, 2016 sent in care of Amparo M. McMurry. <p align="center">~Please see additional page~</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 8/1/2016 per request of counsel.</u></p> <p><u>Note Re Notice to Personal Representative:</u> Declaration of Brenda Cantrell filed 8/24/2016 states that on 8/22/2016 she received a call from Roberta Skogsberg, the sister of the Administrator, Garren McMurry, who stated that Mr. McMurry lived at her address, and that she gave him the notice documents regarding the hearing on 9/8/2016; on 8/24/2016, the Notice of Hearing was sent to Mr. McMurry in care of Ms. Skogsberg at her address.</p> <p><u>Note Re Notice of Motion:</u> Proof of service of notice of the Motion to be Relieved as Counsel filed 8/18/2016 shows the Motion was served to the following persons and entities:</p> <ul style="list-style-type: none"> ROBERTA L. SKOGSBERG, daughter; Wells Fargo Card Services (Creditor's Claim filed 7/23/2007 for \$1,435.08); CHASE BANK (Creditor's Claim filed 5/30/2007 for \$3,120.67); SIMPSON GROUP RETIREMENT FUND (Creditor's Claim filed 9/4/2007 for \$1,248.00); PHILIPS & COHEN for CHASE BANK (Creditor's Claim filed 11/15/2007 for \$1,281.64.) 	
Cont. from 080116				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
✓	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 9/1/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2- McMurry</p>		

Declaration of Susan K. Arthur in Support of Motion to be Relieved as Counsel filed 6/17/2016 states:

- Attorney James R. Walton retired on May 11, 2011; prior to retirement, he represented Garren J. McMurry in a probate matter which was filed on April 12, 2007. Mr. Walton had difficulty maintaining contact with Mr. McMurry throughout the probate proceeding;
- On June 4, 2009, Mr. Walton sent a letter to Mr. McMurry; the letter stated that he had not heard from Mr. McMurry in over a year; Mr. McMurry met with Mr. Walton July 7, 2009 and promised to stay in touch and work to close the estate. Our office has had no further contact with Mr. McMurry since July 7, 2009;
- An Inventory and Appraisal was filed in the probate estate on August 22, 2007; The assets of the estate were: real property located on Elwood Road, Squaw Valley, valued at **\$190,000.00** [vacant lot and mobile home], a 1983 Nissan Pickup valued at **\$500.00** and a 1988 Ford Aerostar valued at **\$700.00**;
- The real property was sold at public auction on or about March 14, 2013, by the Fresno County Tax Collector; [Tax Deed to Purchaser of Tax-Defaulted Property recorded 4/5/2015 shows based on a tax lien for Fiscal Year 2006 -2007, the estate real property last assessed to **JAMES A. MCCURRY** was conveyed to purchaser [name omitted] at a public auction held on 3/14/2013 – 3/18/2013, pursuant to statutory powers of sale under the Revenue and Taxation Code for the sum of **\$22,430.00**]; they are unable to locate the two vehicles;
- On May 15, 2015, their office once again tried to locate Mr. McMurry by calling his last known telephone numbers, mailing letters to his last known address, searching various web sites for information on him and checking to see if Mr. McMurry is incarcerated;
- On May 29, 2015, they spoke with former family member **JULIE SKOGSBERG** who lost contact with Mr. McMurry several years ago and is unable to provide us with any information regarding his current whereabouts;
- On June 11, 2015, they received back from the post office a certified letter we sent to Mr. McMurry; the letter was marked returned to sender, not deliverable, unable to forward;
- On May 16, 2016, their office again tried to locate Mr. McMurry by searching his name in the Whitepages Premium; they called his last known phone number, which is disconnected; the last known address is listed as the same address they have previously sent letters to and they were returned with no forwarding address;
- Through Whitepages Premium they located a potential relative of Garren McMurry, **AMPARO M. MCMURRY**; Amparo has a common previous address as Garren; Amparo McMurry's phone number is disconnected; they sent another letter on May 16, 2016 to Garren McMurray at Amparo McMurray's address in Sanger; they received no answer to this letter;
- They are asking to be relieved as counsel of record in this probate matter because there is nothing their office can do to complete this probate.

Movant states the court should grant attorney's motion to be relieved as counsel of record because the Attorneys hands are tied in this matter. The probate cannot be completed without client's cooperation.

3 Skillit Ruby Barajas & Richard Barajas(GUARD/P) Case No. 07CEPR00504

Petitioner Barajas, Christopher (Pro Per – Father)

Petition for Visitation

Age: 11	CHRISTOPHER BARAJAS , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: Petition pertains to Richard Barajas only. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation for: <ul style="list-style-type: none">Mirna Aguilera (Mother) 2. The Notice of Hearing filed 09/01/2016 indicates that Juanita Abdulla, guardian, was personally served on 08/31/2016; which is only 8 days prior to the hearing and not the required 15 days.
	<u>Please see petition for details</u>	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg	x	
<input type="checkbox"/> Aff.Mail	x	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	x	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/01/2016
		Updates: 09/06/2016
		Recommendation:
		File 3- Barajas

4 Shirley B. Taylor (Estate)**Case No. 10CEPR00830****Attorney: Deborah K. Boyett (for Petitioner Donna T. Wright)**

First And Final Account And Report Of Administrator And Petition For Its Settlement; For Order Fixing And Allowing Statutory Compensation To Attorney And Allowing Compensation To Attorney For Extraordinary Services; And For Final Distribution

DOD: 8/15/10		DONNA T. WRIGHT , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued to 10/19/16 at the request of the attorney. 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing along with a copy of the Petition on: a. Kay McKenzie Parker – pursuant to Request for Special Notice filed on 11/23/2010. 3. Need Order.
		Account period: 7/17/12 – 7/25/16	
		Accounting - \$381,348.32	
		Beginning POH - \$380,600.00	
		Ending POH - \$380,320.07	
Cont. from		Administrator - waives	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney - \$10,312.00	
<input checked="" type="checkbox"/>	Verified	(statutory)	
<input checked="" type="checkbox"/>	Inventory	Attorney x/o - \$7,571.00	
<input checked="" type="checkbox"/>	PTC	(per itemization and declaration for sale of real property, 27.40 hours @ \$275 – 395 per hour.)	
<input checked="" type="checkbox"/>	Not.Cred.	Costs - \$1,070.50	
<input type="checkbox"/>	Notice of Hrg	(filing fees, certified copies, recorder fees)	
<input type="checkbox"/>	Aff.Mail	Distribution, pursuant to intestate succession and assignments of interest is to:	
<input type="checkbox"/>	Aff.Pub.	Donna T. Wright - Real property, personal property, automobile and \$180,166.57	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 7/17/12		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 8/31/16
			Updates:
			Recommendation:
			File 4- Taylor

		KAYSIA BARR and KEITH BARR, Co-Guardians, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 4/2/16 – 7/11/16	<u>Continued to 10/18/16</u> at the request of the attorney.
Cont. from		Accounting - \$72,078.76	<ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on: <ol style="list-style-type: none"> a. Allison Holt (minor) 3. Petition does not include the receipt schedule. 4. Petition does not include the property on hand schedule. 5. Order is incomplete. It only includes the first page and does not include the prayer or signature page. <p>Note: If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, March 11, 2020 at 9:00 a.m. in Department 303, for the filing of the final account and termination of the guardianship. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$61,253.35	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$72,078.76	
<input type="checkbox"/>	Inventory	Guardian - waives	
<input type="checkbox"/>	PTC	Attorney - not addressed	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

**First Account and Report of Guardian, Request for Court to Dispense with
Further Accountings Until the Guardianship is Terminated.**

		KAYSIA BARR and KEITH BARR, Co-Guardians, are petitioners.	NEEDS/PROBLEMS/COMMENTS: <u>Continued to 10/18/16 at the request of the attorney.</u> 6. Need Notice of Hearing. 7. Need proof of service of the Notice of Hearing on: b. Allison Holt (minor) 8. Order is incomplete. It only includes the first page and does not include the prayer or signature page. Note: If the petition is granted, a status hearing will be set as follows: • Wednesday, May 10, 2023 at 9:00 a.m. in Department 303, for the filing of the final account and termination of the guardianship. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
		Account period: 4/2/16 – 7/8/16	
Cont. from		Accounting - \$73,613.21	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$61,872.45	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$73,613.21	
<input type="checkbox"/>	Inventory	Guardian - waives	
<input type="checkbox"/>	PTC	Attorney - not addressed	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

DOD: 06/21/99		<p>MARTHA HUERTA, daughter, was appointed as Administrator with full IAEA and with bond set at \$110,000.00 on 04/02/15.</p> <p>Receipt of Bond filed 05/13/2015 in the amount of \$110,000.00.</p> <p>Letters issued on 05/13/2015.</p> <p>Final Inventory and Appraisal filed 08/03/2015 shows an estate valued at \$55,000.00.</p> <p>Minute Order from 04/02/15 set this hearing for status regarding filing of the First and/or Final Account.</p> <p>Declaration of Philip M. Flanigan and Status Report and Request for Continuance filed 08/26/2016 states on 05/26/2016, Mr. Flanigan's office filed a Declaration stating that the Administrator was unable to sell the home, because her brother was living in the home and had no place to go. Since then, the Administrator and her siblings are making the necessary repairs so that they can list the house. However, the Administrator has been unable to list the home because her brother refuses to vacate the property. The Administrator has had to serve him with a 60 day notice to vacate the property in order for her to complete the duties as the Administrator of the estate. Petitioner respectfully requests that this matter be continued for a period of ninety days to allow the 60 day notice to complete and for her to evict her brother and list the home on the market.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 06/02/2016: Counsel requests 90 days.</p> <p>1. Need First Account or Petition for Final Distribution.</p>
Cont. from 060216			
<input type="checkbox"/> Aff.Sub.Wit.			
<input type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.		<p>Reviewed by: LV</p> <p>Reviewed on: 09/01/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7- Garcia</p>	
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Attorney Perryman, Mark D. (for Petitioner Mark Duggan)
Attorney Pimentel, Paul J. (for Respondent Daniel J. Duggan)

Virginia L. Duggan			MARK DUGGAN , Remainder Beneficiary of Trust B, the irrevocable trust created under the Daniel J. Duggan and Virginia L. Duggan Revocable Living Trust dated 5/31/11, filed a Petition for Findings and Orders to Compel an Accounting or Provide Information on the Trust; Confirm the Creation and Funding of Trust B; and Instructions on Validity of Trust Amendment on 3/24/15. On 4/11/16, DANIEL J. DUGGAN , Co-Settlor and Successor Trustee, filed his First and Final Account of Trust B on 4/11/16. (Mark Duggan filed objections 5/24/16.) Also on 4/11/16, MARK DUGGAN filed a Petition for Breach of Trust; Instructions, Redress, and Removal/Suspension of Trustee . (Daniel J. Duggan filed his Response on 5/26/16.) On 5/26/16, the Court set this status hearing re trial setting.	NEEDS/PROBLEMS/COMMENTS:	
DOD: 4/17/12				<u>Minute Order 6/30/16: Counsel is not ready for trial yet. Continued to 9/8/16.</u> As of 9/6/16, nothing further has been filed.	
Cont. from 063016					
	Aff.Sub.Wit.				
	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg				
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
			Reviewed by: skc		
			Reviewed on: 9/6/16		
			Updates:		
			Recommendation:		
			File 8- Duggan		

**Petition for Approval of Waiver of Account, Report of Executor, Allowance of
Executor's Statutory Fees, Allowance of Attorneys Statutory Fees, Allowance
of Executor's Extraordinary Compensation and For Final Distribution**

DOD: 11/27/2014		ZEPURE "ZEPPY" ATTASHIAN , executor, is petitioner. Petitioner was appointed Special Administrator on 9/2/2015 for the sole purpose of entering in a sales contract for decedent's real property. All net funds received were to be placed into a blocked account. \$35,758.90 were deposited into blocked account on 10/14/2015 for sale of real property located in Clovis, CA. Accounting is waived I&A - \$285,765.82 POH - <i>not provided</i> Executor - \$ 4,000.00 <i>(statutory)</i> Executor X/O - \$ 3,375.00 <i>(for 9.5 hours expended for purposes of selling properties so they would not be lost to foreclosure)</i> Attorney - \$ 4,000.00 Closing - \$2,500.00 <i>(includes costs of \$250.00 to Probate Referee, \$56.24 for taxes on real property and \$1,305.00 filing fees)</i> Distribution, pursuant to decedent's will, is to: Jessica L. Bongardt - cash, stock and real property	NEEDS/PROBLEMS/COMMENTS: <u>Continued to 10/24/16 at the request of the attorney.</u> 1. Final I&A filed 6/27/2016 lists at attachment 1, item 1, funds held in a blocked account as a result of the sale of real property on 9/29/2015, located at 650 W. Donner, Clovis CA. This property was on hand at decedent's death, so should be listed on attachment 2 of the I&A at its value as of the decedent's date of death. 2. Fee base is calculated incorrectly. See CA Rules of Court 7.705. 3. Petition does not include a property on hand schedule listing the value of the assets on hand. 4. Petition does not include a statement re: notice to Victim's Compensation (Prob C§ 9202(b)). 5. Petition does not include a statement re: notice to Franchise Tax Board (Prob C§ 9202(c)). 6. Distribution does not provide for the specific devise of \$2,000.00 to Suzanne Rosales or provide proof that it was previously satisfied. <p align="center">See additional page.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 11/16/2015		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202 x		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice x		

Reviewed by: SEF
Reviewed on: 9/2/2016
Updates: 9/2/2016 (KT – 9/6/16)
Recommendation:
File 9- Bongardt

NEEDS/PROBLEMS/COMMENTS, continued:

7. Petitioner is requesting dual compensation of \$4,000.00 each in statutory fees, as both personal representative and attorney of decedent's estate.

Probate Code 10804 states:

"Notwithstanding any provision in the decedent's will, a personal representative who is an attorney shall be entitled to receive the personal representative's compensation as provided in this part, but shall not [emphasis added] receive compensation for services as the attorney for the personal representative unless the court specifically approves the right to the compensation in advance and finds that the arrangement is to the advantage, benefit, and best interests of the decedent's estate."

DOD: 02/03/2016	AMOS DAVIS , son was appointed Executor without bond on 04/14/2016.	NEEDS/PROBLEMS/COMMENTS: 1. Need Final Inventory and Appraisal.
	Letters issued on 04/14/2016.	
Cont. from	Minute Order of 04/14/2016 set this Status Hearing for the filing of the Inventory and Appraisal.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/01/2016
		Updates: 09/06/2016
		Recommendation:
		File 10- Davis

First Amended Spousal or Domestic Partner Property Petition

DOD: 10/27/14		<p>CHARLOTTE SOUZA, surviving spouse, is petitioner.</p> <p>No other proceedings</p> <p>Decedent died intestate.</p> <p>Petitioner states she and the Decedent acquired the real property in 1996 during their marriage. Petitioner and Decedent did not have separate property and utilized community property assets to purchase the home and for all mortgage payments.</p> <p>Petitioner requests court confirmation that ½ interest in real property located in Kerman belongs to her and ½ interest passes to her pursuant to intestate succession.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 9/1/16	
			Updates:	
			Recommendation: SUBMITTED	
			File 11- Souza	

12 Mileena Padilla, Melody Padilla, Cesar Herrera, JR (GUARD/P)**Case No. 16CEPR00583****Attorney Myers, R. Rich (for Kevin Herrera & Clementina Herrera – Petitioners - Paternal Uncle and Aunt)****Guardian Rios, Frank Javier (Pro Per)****Guardian Rios, Diana (Pro Per)****Petition for Appointment of Temporary Guardian of Cesar Herrera ONLY (Competing)**

Age: 9	GENERAL HEARING 10/26/2016	NEEDS/PROBLEMS/COMMENTS:
	KEVIN HERRERA and CLEMENTINA HERRERA , paternal uncle and aunt, are petitioners.	Note: This Petition pertains only to CESAR HERRERA, JR.
Cont. from	Please see petition for details	FRANK JAVIER RIOS and DIANA RIOS , maternal grandparents, were appointed temporary guardians of Cesar Herrera, Jr. on 07/20/2016. The hearing on the general petition is set for 09/12/2016.
<input type="checkbox"/> Aff.Sub.Wit.		Mr. and Mrs. Rios were also appointed temporary guardians of Mileena Padilla and Melody Padilla on 06/16/2016. The continued hearing on their general petition regarding Mileena and Melody is set for 09/14/2016.
<input checked="" type="checkbox"/> Verified		1. Notice of Hearing filed 09/06/2016 indicates that the Temporary Co-Guardians, Frank and Diana Rios were served by mail on 08/24/2016. Personal service is required pursuant to Probate Code 2250. Note: A proof of service was filed on 09/06/2016 indicating that Diana Rios was personally served on 08/28/2016 however the Notice of Hearing showing personal service must be filed.
<input type="checkbox"/> Inventory		2. A Proof of Service was filed on 09/06/2016 for Cesar Herrera-Torres, father, showing Mr. Herrera-Torres was personally served on 08/25/2016 which indicates that the Notice of Hearing was also served however the Notice of Hearing showing personal service must be filed.
<input type="checkbox"/> PTC		Please see additional page
<input type="checkbox"/> Not.Cred.		Reviewed by: LV
<input type="checkbox"/> Notice of Hrg	x	Reviewed on: 09/01/2016
<input type="checkbox"/> Aff.Mail		Updates: 09/06/2016
<input type="checkbox"/> Aff.Pub.		Recommendation:
<input type="checkbox"/> Sp.Ntc.		File 12- Herrera
<input type="checkbox"/> Pers.Serv.	x	
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA	x	
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		

Dept. 303, 9:00 a.m. Thursday, September 8, 2016

3. A Proof of Service was filed on 09/06/2016 for Frankie Diana Rios, mother, showing Ms. Rios was personally served on 08/28/2016 which indicates that the Notice of Hearing was also served however the Notice of Hearing showing personal service must be filed.
4. Need UCCJEA.

DOD: 10/09/2002	NANCY RAMOS , was appointed Administrator with full IAEA authority and with bond set at \$25,000.00 on 08/04/2016.	NEEDS/PROBLEMS/COMMENTS:	
	Letters have not issued.	Note: A Petition for Waiver of Appraisal by Probate Referee and Statement of Cause was filed 08/30/2016. Hearing is set for 10/13/2016	
Cont. from	Minute Order of 08/04/2016 set this Status Hearing for the filing of the bond.		
Aff.Sub.Wit.		1. Need Bond in the amount of \$25,000.00 or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			Reviewed by: LV
Order			Reviewed on: 09/01/2016
Aff. Posting		Updates:	
Status Rpt		Recommendation:	
UCCJEA		File 13- Marple	
Citation			
FTB Notice			

14 Wanda Joyce Owens (CONS/PE)**Case No. 16CEPR00681**

Petitioner: Mark Owens (Pro per – Nephew)

Attorney: Deborah Boyette (court-appointed for Proposed Conservatee)

Petition for Appointment of Conservator of the Person and Estate

TEMPORARY EXPIRES 9/8/2016			NEEDS/PROBLEMS/COMMENTS:
<p>MARK OWENS, nephew, is petitioner and requests appointment as conservator of the person and estate without bond and medical consent and dementia powers.</p> <p><i>See petition for details.</i></p>			
Cont. from 081116			<p>Court Investigator Advised Rights on 8/2/2016.</p> <p>Minute order dated 7/12/2016 re: temporary hearing set bond at \$32,732.00 for general petition and stated petitioner needs court approval to move conservatee or sell her property.</p> <p>Minute order dated 8/11/2016 states Attorney Boyett represents that Petitioner has worked on the bond and it is nearing issuance.</p> <p>As of 8/31/2016, bond has not been filed and temporary letters have not issued. Bond filed 9/6/2016.</p> <p>1. <i>Dementia Attachment to Capacity Declaration</i> filed 6/29/2016 is incomplete at items 9b(1) and (2) re: specific medications the proposed conservatee needs or would benefit from and conservatee's mental function deficits.</p> <p>2. Need video viewing receipt. Filed 9/7/2016.</p> <p>See additional page.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 8/31/2016
			Updates: 9/7/2016
			Recommendation:
			File 14- Owens

NEEDS/PROBLEMS/COMMENTS, *continued*:

Note: If the petition is granted, status hearings will be set as follows:

- ~~Tuesday, October 11, 2016~~ at 9:00 am in Department 303, for the filing of the bond. Bond filed 9/6/2016.
- **Tuesday, January 10, 2017** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Tuesday, November 7, 2017** at 9:00 a.m. in Department 303, for the filing of the first account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

15 Connie Yanez (Estate)**Case No. 16CEPR00764****Attorney Boyajian, Thomas (for Albert Romero – Petitioner – Grandson)****Petition for Probate of Will and for Letters Testamentary with IAEA**

DOD: 10/22/2014	ALBERT ROMERO , grandson/named executor without bond is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Need Confidential Supplement to Duties & Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S. 2. #5a(3) or #5a(4) was not answered regarding a registered domestic partner. 3. Petition indicates there is a predeceased child therefore pursuant to Local Rule 7.1.1D. Note: If the petition is granted status hearings will be set as follows: • Thursday, 02/09/2017 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 11/09/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Full IAEA – o.k.	
	Will dated: 09/20/2013	
Cont. from	Residence: Fresno Publication: The Business Journal	
<input type="checkbox"/> Aff.Sub.Wit.	Estimated value of the Estate: Personal property - \$100,000.00	
<input checked="" type="checkbox"/> Verified	Probate Referee: Steven Diebert	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input checked="" type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/01/2016
		Updates: 09/06/2016
		Recommendation:
		File 15- Yanez

Attorney David A. Roberts (for Petitioner Jennifer Linkes)

Petition for Letters of Administration; Authorization to Administer Under IAEA

DOD: 5/21/2016	JENNIFER LINKES , sister, is Petitioner and requests appointment as Administrator with bond set at \$263,800.00 .		NEEDS/PROBLEMS/COMMENTS: Note: Court will set status hearings as follows: <ul style="list-style-type: none"> Monday, October 11, 2016 at 9:00 a.m. in Dept. 303 for filing proof of \$263,800.00 bond; Wednesday, February 8, 2017 at 9:00 a.m. in Dept. 303 for filing of inventory and appraisal; and Wednesday, November 8, 2017 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.
Cont. from	Full IAEA — OK		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory	Decedent died intestate.		
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.	Residence — Squaw Valley		
<input checked="" type="checkbox"/> Notice of Hrg	Publication — Business Journal		
<input checked="" type="checkbox"/> Aff.Mail	W/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.	Estimated value of the Estate:		
<input type="checkbox"/> Pers.Serv.	Personal property - \$ 13,600.00		
<input type="checkbox"/> Conf. Screen	Real property - \$240,000.00		
<input checked="" type="checkbox"/> Letters	Annual income-RP - \$ 10,200.00		
<input checked="" type="checkbox"/> Duties/Supp	Total - \$263,800.00		
<input type="checkbox"/> Objections	Probate Referee: Rick Smith		
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LEG
			Reviewed on: 9/1/16
			Updates:
			Recommendation: SUBMITTED
			File 16- Bulmer

DOD: 07/04/2016	KELVIN MIYAKAWA , brother, is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> If the petition is granted status hearings will be set as follows: <ul style="list-style-type: none"> • Thursday, 02/09/2017 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 11/09/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from	KELVIN MIYAKAWA , was appointed Special Administrator on 07/29/2016. Letters of Special Administration expire 09/08/2016.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory	All heirs waive bond	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Full IAEA – o.k.	
<input checked="" type="checkbox"/> Notice of Hrg	Decedent died intestate	
<input checked="" type="checkbox"/> Aff.Mail	w/ Residence: Fresno	
<input checked="" type="checkbox"/> Aff.Pub.	Publication: The Business Journal	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	<u>Estimated value of the Estate:</u>	
<input type="checkbox"/> Conf. Screen	Real property - \$536,219.00	
<input checked="" type="checkbox"/> Letters	<u>Less encumbrances - \$167,076.00</u>	
<input checked="" type="checkbox"/> Duties/Supp	Total - \$369,143.00	
<input type="checkbox"/> Objections	Probate Referee: Rick Smith	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LV
<input type="checkbox"/> Status Rpt		Reviewed on: 09/01/2016
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation: Submitted
<input type="checkbox"/> FTB Notice		File 17- Miyakawa

Petition to Determine Succession to Real Property

DOD: 8/3/15	LOIS HARRIS PERKINS , surviving spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. There is no record that the original will has been deposited. Probate Code §8200. 2. Attachment 11 does not state the decedent's interest in the real property as required. 3. Need Order.
	40 Days since DOD.	
	No other proceedings.	
Cont. from	Will dated: 3/23/05 devises entire estate to spouse, Lois Harris Perkins.	
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$110,000.00	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that Decedent's interest in real property pass to her pursuant to Decedent's will.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/1/16
		Updates:
		Recommendation:
		File 18- Perkins

Petitioner: Yolanda Ibanez (Pro per – Mother)

Petitioner: Merrissa Madrigal (Pro per – Mother)

Petition for Appointment of Probate Conservator

		<u>TEMPORARY WAS DENIED</u>	NEEDS/PROBLEMS/COMMENTS:
		YOLANDA IBANEZ and MERRISSA MADRIGAL, mother and sister, are petitioners and request appointment as co-conservator of the person with medical treatment consent powers.	Court Investigator Advised Rights on 8/24/2016 1. Need Citation. Filed 9/6/2016. 2. Need proof of personal service at least 15 days before the hearing of <i>Citation</i> with copy of general petition on proposed conservatee.** <u>**Note: Proof of personal service filed 9/6/2016, was served by Yolanda Ibanez. Ms. Ibanez is petitioner and therefore, not authorized to serve documents in this matter.</u> 3. Need Notice of Hearing. 4. Need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the general petition on the following: a. Patricio Ibanez, Jr. (father) b. Antonia Cobarrubias (maternal grandmother) 5. Need proof of service at least 30 days before the hearing of <i>Notice of Hearing</i> with a copy of the general petition on the following: a. Central Valley Regional Center (CVRC) pursuant to Prob C §1822(e). 6. Need video viewing receipt for both petitioners.
Cont. from		See petition for details.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt	X	
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 9/1/2016
			Updates: 9/7/2016
			Recommendation:
			File 19- Ibanez

			THERE IS NO TEMPORARY. Temporary was denied.	NEEDS/PROBLEMS/COMMENTS:
			RUSSELL W. FRANKS , spouse, is petitioner.	
Cont. from			Please see petition for details.	1. Need Capacity Declaration re: request for medical consent and dementia powers.
	Aff.Sub.Wit.			
✓	Verified		Status Report of Petitioner and Request for Continuance filed on 8/31/16	
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 9/1/16	
			Updates:	
			Recommendation:	
			File 20- Franks	

Petitioner Pena, Lucy (Pro Per – Sister)

Petition for Appointment of Probate Conservator of the Person

Age: 58		<p align="center"><u>NO TEMPORARY REQUESTED</u></p> <p>LUCY PENA, sister is petitioner.</p> <p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv. w/		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input checked="" type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input checked="" type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 09/01/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21- Uribe</p>	

Petitioner Tammy Marie Jones Swanegan (Pro Per, daughter)
 Attorney Curtis D. Rindlisbacher (Court-appointed for Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate

		NO TEMPORARY REQUESTED		NEEDS/PROBLEMS/COMMENTS:	
		TAMMY SWANEGAN , daughter, is		1. <u>Continuance of this matter is required</u> due to Petitioner serving notice of an incorrect hearing date. Notice of Hearing filed 8/29/2016 contains the incorrect hearing date of <u>9/9/2016</u> rather than 9/8/2016, necessitating continuance of this hearing. Need Notice of Hearing and proof of service by mail of the notice with a copy of the <i>Petition for Appointment of Probate Conservator</i> showing notice was mailed at least 15 days before the continued hearing date given by the Court, pursuant to Probate Code § 1822 for all of the relatives named in the Petition pursuant to Probate Code § 1822(b)(2).	
		Petitioner.			
		~Please see Petition for details~			
Cont. from		Court Investigator's Report was filed on 9/1/2016.			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
✓	Cap. Dec.				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	W/		~Please see additional page~	
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp	X Need Supp			
	Objections				
✓	Video Receipt				
	CI Report				
	9202			Reviewed by: LEG	
✓	Order			Reviewed on: 9/2/16	
	Aff. Posting			Updates:	
	Status Rpt			Recommendation:	
✓	UCCJEA			File 22- Jones	
✓	Citation				
	FTB Notice				

NEEDS/PROBLEMS/COMMENTS, continued:

2. *Proof of Personal Service* of the *Citation* filed 8/29/2016 does not show notice was personally served to the proposed Conservatee at Item 3(a), as the proof does not indicate a date and time of service; additionally, no date is indicated at the signature of the person serving the notice (Bernardo Yniguez.) Need proof of personal service of the *Citation* at least **15 days** before the hearing pursuant to Probate Code § 1824.
3. Court may require Petitioner to provide additional information in Item 5(c) of the *Petition* filed 8/8/2016, as supporting facts for the Court to determine that the proposed conservatee is unable to properly provide for her personal needs for physical health, food, clothing, or shelter.
4. Need *Confidential Supplemental Information Form* (Judicial Council form GC-312) to be filed with the Court pursuant to Probate Code § 1821.
5. Item 1(k) of the *Petition* filed 8/8/2016 requests orders relating to dementia placement or treatment. Since dementia powers are requested, need the mandatory *Attachment Requesting Special Orders Regarding Dementia* (Judicial Council form GC-313) to be filed with the Court in support of the Petitioner's request.
6. *Petition* is **not marked** at Item 1(g) for the Court to consider granting medical consent powers. Additionally, *Petition* is **not marked** at Item 9(a) indicating that there is no form of medical treatment for which the proposed Conservatee has the capacity to give an informed consent. However, Item 9(b) is marked indicating that a *Medical Capacity Declaration* in support of Petitioner's request is filed with the *Petition*. Need confirmation regarding whether Petitioner requests medical consent powers in addition to the separate and distinct dementia powers.
7. Since dementia powers are requested, need the mandatory *Dementia Attachment to Capacity Declaration - Conservatorship* (mandatory-use Judicial Council form GC-335A) to be filed as part of the *Capacity Declaration* completed by the physician.

Note: Bond is required for conservatorship estates pursuant to Probate Code § 2320 and CA Rule of Court 7.207, except for the value of any real property of the proposed conservatee, which cannot be sold without Court approval. Real property valued at **\$203,000.00** is indicated as the only asset of the proposed conservatee. Court may waive bond (if Petitioner's representation is accurate regarding the estate assets) under Probate Code § 2321 which provides the Court may not waive bond without a good cause determination that Conservatee will not suffer harm as a result of the waiver.

Petition for Appointment of Temporary Guardian of the Person

		<u>GENERAL HEARING 10/27/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		VIVIAN COLMENERO , maternal great-grandmother, is petitioner.	<ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the temporary petition <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for: <ol style="list-style-type: none"> a. Gena BabyGirl Ramos (mother)
Cont. from			
	Aff.Sub.Wit.		
✓	Verified	<i>See petition for details.</i>	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 9/1/2016
			Updates:
			Recommendation:
			File 23- Ortega

DOD: 07/28/2008	CHANEL CLAYTON , granddaughter, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
Cont. from 090116	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	I&A - \$100,000.00	
<input checked="" type="checkbox"/> Inventory	Decedent died intestate	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Petitioner request Court determination that Decedent's 100% interest in real property located at 1911 S. Woodrow St. Fresno, Ca. pass to Chanel Clayton pursuant to intestate succession.	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/06/2016
		Updates:
		Recommendation: Submitted
		File 24- Hervey

Petitioner Sheila R. Scott (Pro Per, Conservator of the Person and Estate)

Ex Parte Petition for Withdrawal of Funds from Blocked Account

DOD: 8/28/2016		<p>SHEILA R. SCOTT, mother, and Conservator of the Person appointed on 9/11/2014; and Conservator of the Estate appointed on 3/24/2015, is Petitioner.</p> <p align="center">~Please see Petition for details~</p> <p>Order on Ex Parte Petition for Withdrawal of Funds from Blocked Account filed 9/1/2016 set this hearing on 9/8/2016, requiring the following:</p> <ol style="list-style-type: none"> Petitioner shall file with the Court prior to the 9/8/2016 hearing, supporting documentation consisting of quote(s) from funeral parlor for burial arrangements and funeral service; and Notice of the Ex Parte Petition for Withdrawal of Funds from Blocked Account shall be served by the Petitioner at least 5 days prior to the 9/8/2016 hearing to all interested parties, as follows: <ul style="list-style-type: none"> J.L. SCOTT; ODESSER SCOTT; and ANTOINE D. FOSTER. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Update:</u></p> <ul style="list-style-type: none"> Proof of Service of Notice of Hearing filed 9/7/2016 shows service to persons as ordered was made on 9/6/2016. Verified Declaration filed 9/7/2016 states the funds will be used for the deceased Conservatee's funeral services and burial, and contains attached copies of quotes for services as specifically itemized. 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			✕
✓	Aff.Mail			✕
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: LEG</p> <p>Reviewed on: 9/2/16</p> <p>Updates: 9/7/16</p> <p>Recommendation:</p> <p>File 25- Foster</p>	